OpenERP Logistic User's Manual

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OpenERP Logistic User's Manual

Goal

Guide the management of the information related to Logistic Operations using the Enterprise Resource Planning tool available for the company (OpenERP), to create accurate and correct related documents (Logistic Sales Orders, Invoices, etc.) and to keep the logistic operations projects updated and reliable.

Scope

This document will help the user from its First Steps, access to the ERP platform, Manage the basic functions of project module to organize the logistic information flow, generate and manage related documents from other modules (quotations, sales orders, invoices, payment receipts, etc.), keep assertive communication between the logistic team and between them and other departments. Ending with the report options and using different views on OpenERP.

About OpenERP

OpenERP is an amazing software system that is easy to use and provides great benefits to help you organize your daily work.

Users no need to install special software (a web browser is enough), and offers unrivaled functionality, all you require is a device with internet access.

Accessing to OpenERP

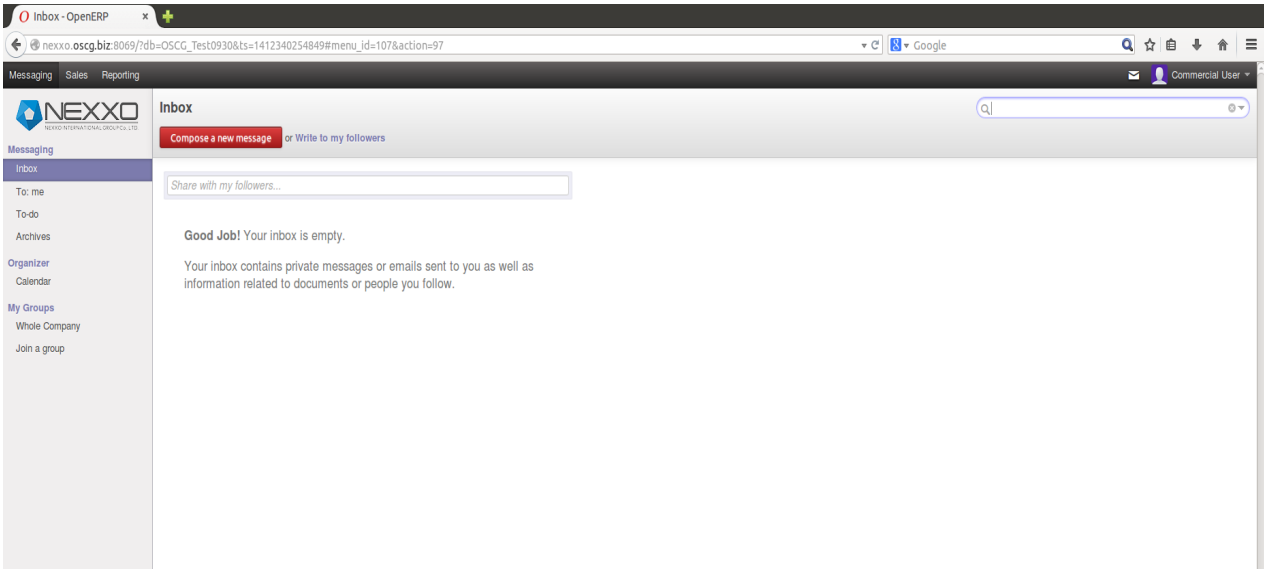
To access OpenERP you must enter the following address in your web browser: http://erp.nexxogroup.com/

Enter the username and password that were supplied by the system administrator

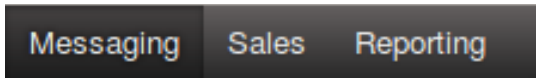
Ensure to select the right database on the top corner of the screen.

Working in OpenERP

We will explain the different components of the work area in OpenERP:



Main Menu: It Indicates the modules which your user can access, in this case the user can access to sales functionalities, messaging, and sales reports modules.

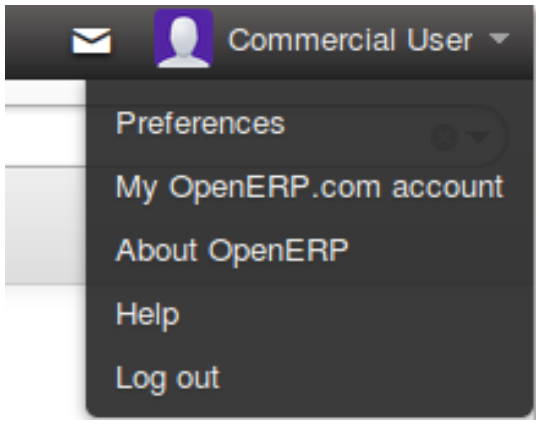


User Menu: The menu at the top right allows:

Modify **user preferences**, such as name, language, email, signature for outgoing mails, and others.

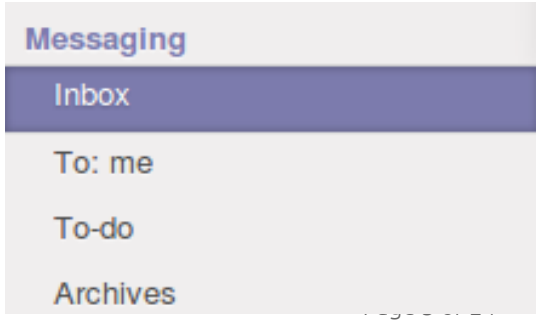
To check the documentation and **Help**

Log off to exit of the system.



Compose a new message: This is a quick access icon that is always available while you work, will allow you to send an email at any time.

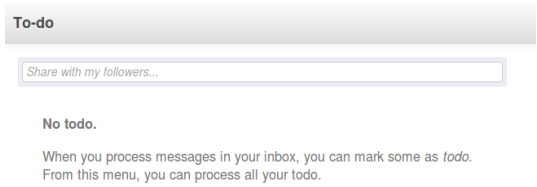
Vertical Menu: contains the options related to the main menu that is active.



Search Bar: this tool allows searches related to

the area where you are working, it has different filter options.

Workspace: It is the larger space on the screen and this is where the documents information is displayed while working in OpenERP.


To-do
Share with my followers...
No todo.
When you process messages in your inbox, you can mark some as todo.
From this menu, you can process all your todo.

From the logistic service quotation to cargo tracking in a organized way

Here we will show you a complete flow for a logistics operation, from Logistic project creation, planning and assigning tasks, executing tasks in the project module, completing special tasks that relate another modules until the cargo tracking in a descriptive scenario, adding explanations to exceptionals situations.

First you will get an explanation about the use case (what Scarlett or one of his colleagues is supposed to do). Then the Notes beside the pictures will let you learn how Scarlett (or a colleague of her) enters the information in OpenERP.

Use case

Our company was exhibiting at the "House & Design" Fair in Paris and Juan Esteban, a salesman of our company made some business. Paulo has requested to the chinese purchases department to buy some products, so now the goods already arrived to Guangzhou warehouse and Scarlet must arrange everything to send those goods to the customer but keeping the Logistic operations records on a organized way.

How Manage Logistics operations in OpenERP?

The logistic operations are not different to a project, it have Teams, a lot of information, documents, tasks organized on a logical way and the time is very important here.

The project module of OpenERP is a versatile tool to planning the daily work, manage every kind of information and arrange the activities, keep records, follow the advances and achieve goals on time.

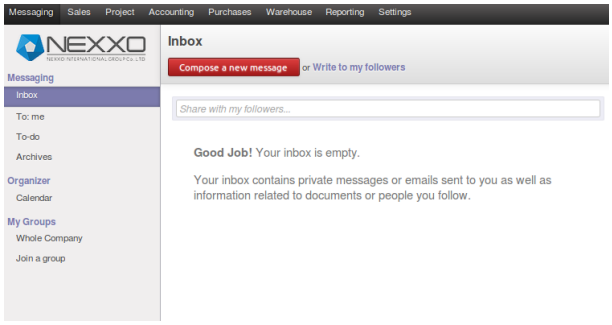
In OpenERP all the modules are related, then some activities or documents related to the logistic operations will be executed by other modules or persons i.e.: Sales Orders for Logistic services will be managed by commercial department on the Sales module, Invoices and payments shall be recorded by accounting department on accounting module and so on, then **the project module will be helpful to organize the work flow and to keep record of each operation**.

Communication between Logistic team and other Departments

All the time, Scarlett and her team can be in contact with other departments to solve and clarify any situation about the Logistic sales order status, the accounting, the logistic operation or any topic using the messaging option of the ERP or adding each other as followers to the documents.

Using direct messages through messaging module

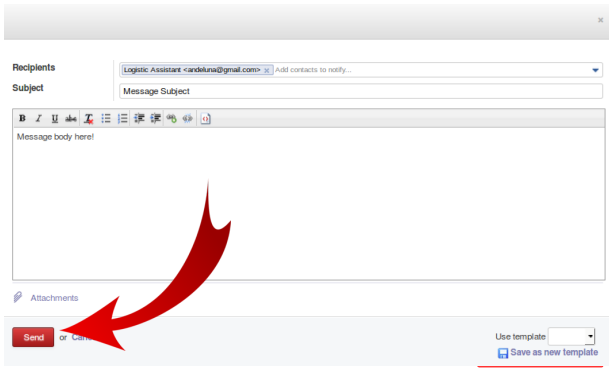
The user goes to **Messaging → Messaging → Inbox** and clicks on the "**Compose a new message**" button.



A new window will appear and he can choose the recipients, compose the message and attach documents here.

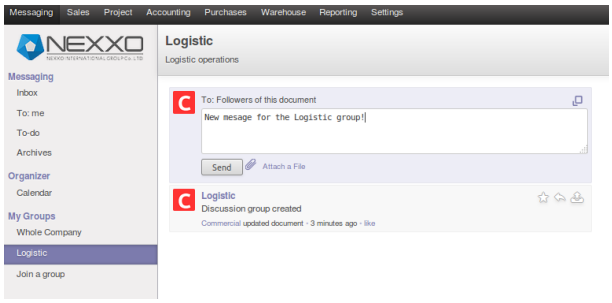
At the right side is the Template function, then for the agility he can choose a template or create new ones.

Later he clicks on the "**Send**" button.



In the same module they have another usable option that is "**Groups**", to create a group message he goes to **Messaging → My Groups → Logistic** he compose the message and clicks on "**Send**" button.

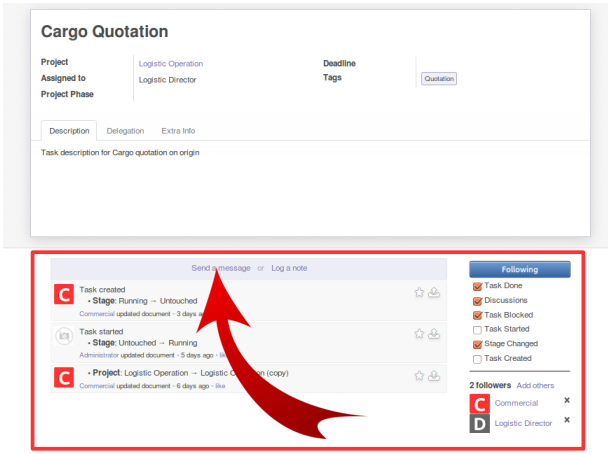
All the messages that he send by here will be received by the complete logistic team.



Following documents through any module

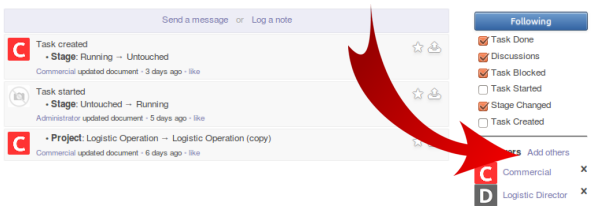
OpenERP structure has different kind of documents to arrange the work, The communication can success also from any of these documents: from a Sales Order, from an Invoice even from a task on the Logistic operation projects, etc.

No matter which document we are talking about, on the form view, at the bottom the user can find the "**Send a Message**" option and the "**Follow**" options.



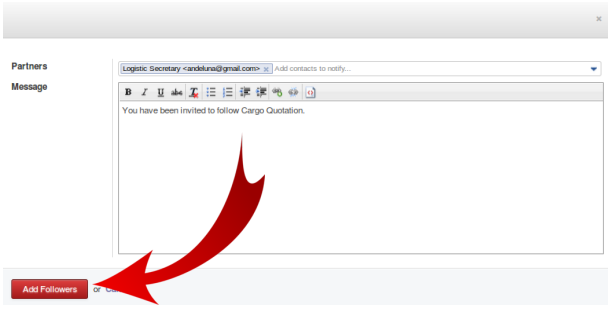
From the document he clicks on the "**Send a message**" button to send a message to the actual followers of the document.

To add a new follower to the document he clicks on "**Add Others**" button, then a pop-up screen will appear.

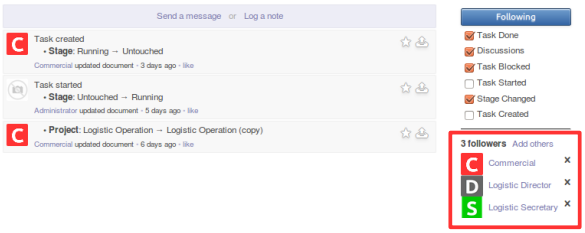


He look for the partners that want to add as a follower. The system got a invitation message by default but anytime he can change it.

Later he clicks on "**Add followers**" button.



The new follower of the document will appear after he clicked on "**Add followers**" button.



Note: when the users send a message to partners that are not followers of the document, the system will automatically add them as followers and they will see all the history of that document.

Managing Logistic Operations as a Project

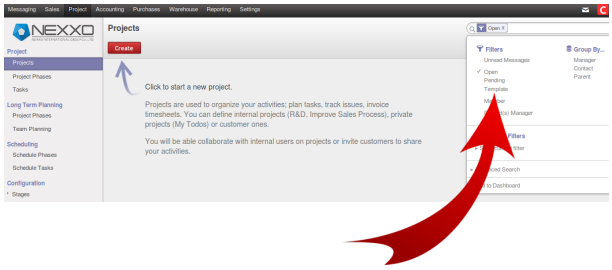
Here we will explain the main project module functions that are useful to manage Logistic Operations.

Creating a new Logistic operation Project

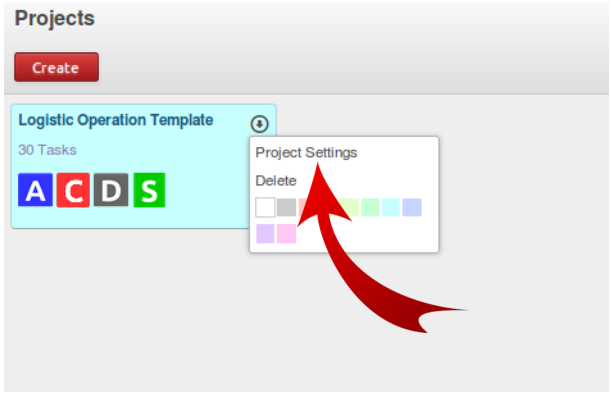
For easily work we have defined a project template which contain all the steps that a logistic operation contain.

When a new logistic operation starts, the Logistic department director just have to create a new project based on the logistic project template and assign a new name for it.

Scarlett goes to **Project → Project → Projects** and removes the default filter (Open) by clicking on the "**X**" or chooses a new filter to show the "**Templates**".

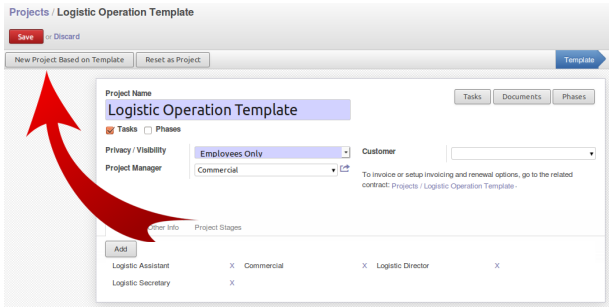


The templates projects appear, then she chooses the right one and clicks on the arrow icon at the right corner and clicks on "**Project Settings**" option.



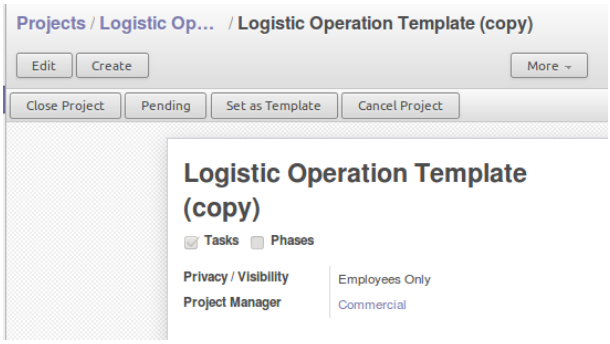
From the next window she clicks on the "**New Project Based on Template**" button.

From this window she also can edit the default settings for the template if it is necessary.



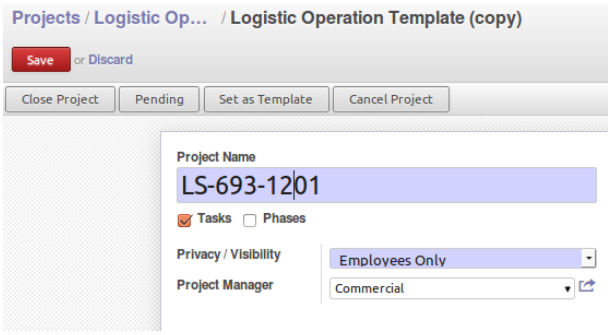
OpenERP creates a new project with the same settings than the original one, the only difference is that the new project name has the "**Copy**" word at the end of the name.

Scarlett clicks on "**Edit**" button to change the project name.



On the project name field she can use, letters, numbers and special characters, then the logistic department can define a **own code by the project name** to identify the projects easyly based on destination, date or whatever.

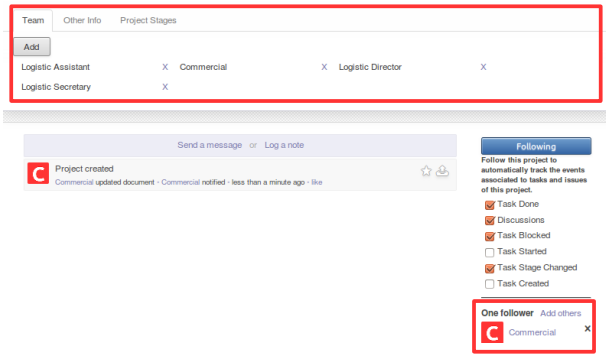
Anyway the system will provide different search options from the filter bar.



From the same window the Logistic Director can add or delete members of the Logistic Operation team.

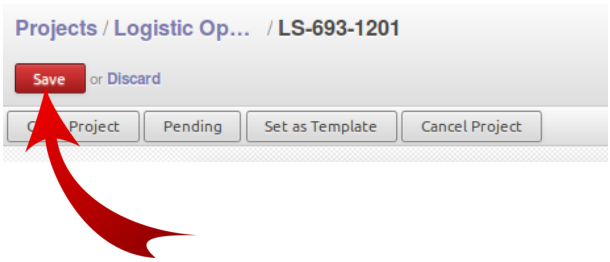
If she uses the "**Add others**" option from underside then that partners will be added as followers to all the tasks and they will receive notifications about all the tasks

Note: by default only the project manager is added as follower to all the tasks.

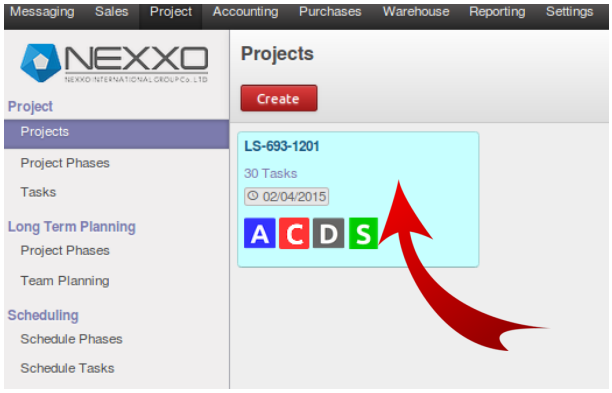


From the "**Other Info**" Tab Scarlett can change the "**Start Date**" and the "**End Date**" to define the Initial date to start the Logistic operation and Deadline to finish it.

when all is clear, she clicks on "**Save**" button and the new Logistic Operation Project is ready to use.

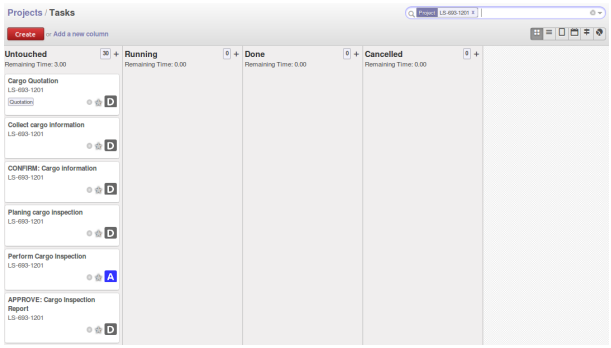


The Logistic operation project has tasks by default, to view them the users go to **Project → Projects** and opens it by clicking on it.



By default the tasks will show on "**Kanban View**" it mean like stickers on a board with columns.

Note: the users have more views available on the right side icons. please check details about it on the last section of this document "**Using different views on OpenERP**"



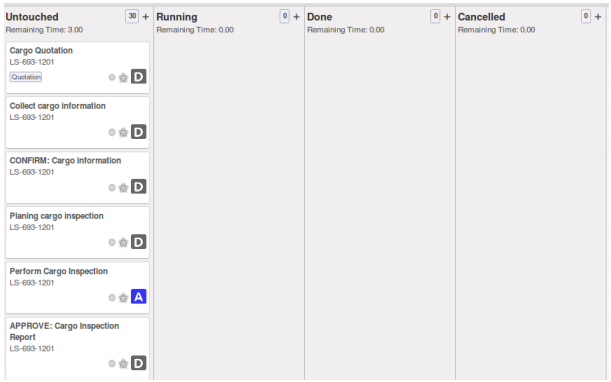
The columns on the board represent a stage of the task, by default the Logistic Operation project contain four stages for the tasks:

Untouched: It means that the task has been created but at the moment nobody is working on it

Running: It means that the responsible of the task is working on it

Done: It means that the task is already complete

Cancelled: It means that the task has been cancelled for any reason

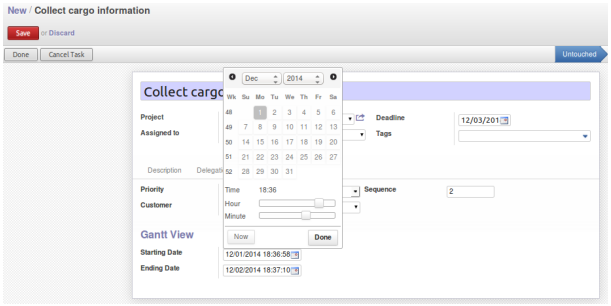


Each task shows the basic Information (Name, related project, Deadline), Tags, some Icons like the priority and the Profile Image of the task's responsible.

Scheduling Logistic Operation tasks

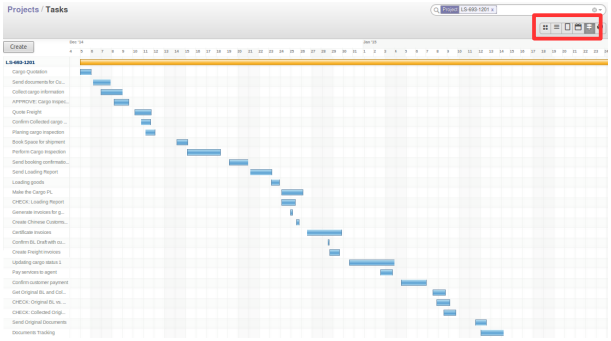
Once the Logistic operation Start, the logistic manager will schedule the times to execute the tasks. By default the system will assign Start Dates and End Dates based on the template for the project when this is created, but anytime the logistic director and the users can change the deadlines and the schedule for each one.

To assign a Start date and end date to the tasks, the user goes to **Project → Projects** and opens the right task. then by clicking on edit button the user can set up the dates from the "**Other Info**" tab.



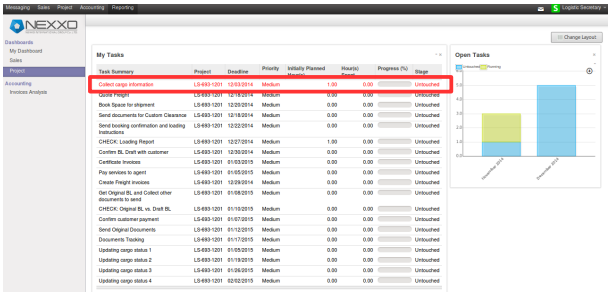
To check the schedule for the Logistic operation, Scarlett goes to **Project → Projects**, opens the project and chooses the "**Gantt view**".

By here, she also can change the start and end dates for each logistic task just dragging and dropping the blue lines.



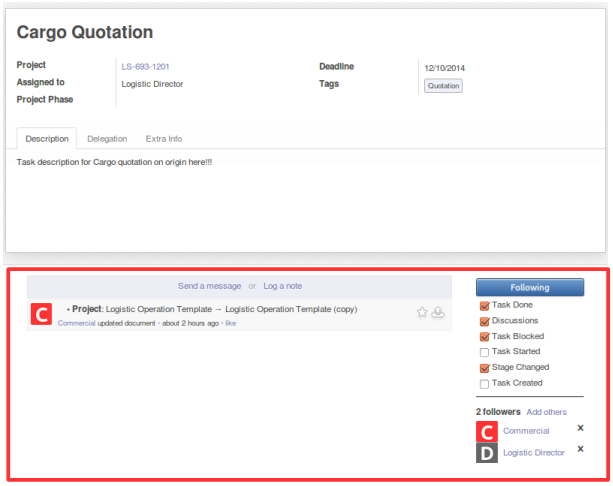
All time the users can see the status and scheduled date of each own activity. They go to **Reports → Dashboards → project** and the system will show a list of activities that include the name of the task, the related Logistic operation project, the deadline, the priority, and the stage of the task.

When a task is red in color it means that the task is out of due time.



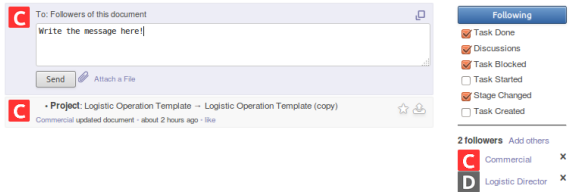
Running Tasks

To check the details about one specific task, the user clicks on it and the view will change from the Kanban view to the Form view.



On the bottom, the users can view the history of this task and the followers of this. from here they can send messages to the followers and log notes, both cases they can attach documents like excel, docs, pics and so on.

To send a message or log a note the user clicks on the right button and just write the message, then he attach the file by clicking on the "**Attach a File**" option and choose the file, after that he clicks on the "**Send**" button.

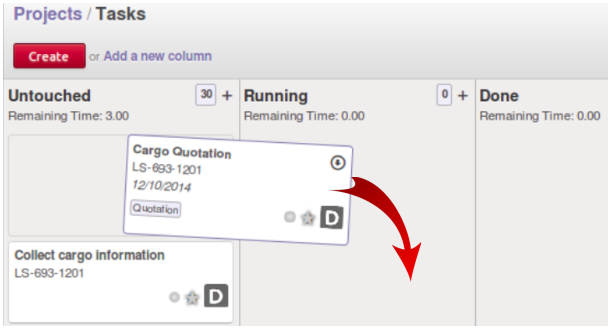


Updating Task Stages

Important:

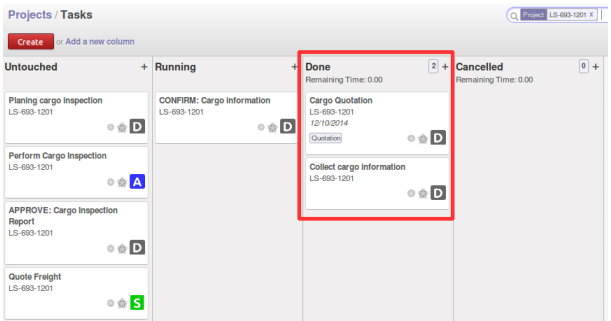
Every time that a task is in a new stage the users have to indicate it on the system, then the Logistic operation will be updated all the time and the Logistic manager will can know the real status of the operation and will be able to take the accurate decisions.

To update task progress, the users go to open the project by **Project → Project → Tasks**. Then from the Kanban view he can change the tasks stage just dragging and dropping them.

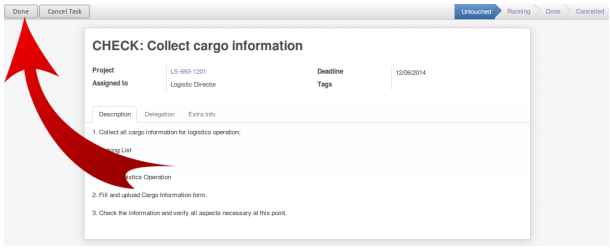


Leaving Task as "Done"

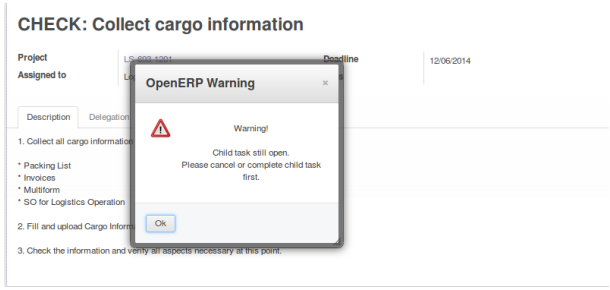
The responsible of each task has to ensure that the task is in the right stage every time. When a task is completed according to the procedure manual and the task description, the user has to put it on the "**Done**" column.



From the form view is also possible to change the task stage. The user opens to the concerned task and clicks on "**Done**" button.



Note: If this warning screen appear when the user try to leave as "**Done**" any task, it means that the task has a related task that have to be finished or cancelled before to finish the actual one.

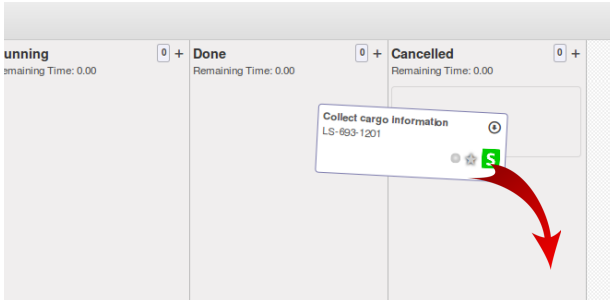


Because every logistic operation can have different situations, the users maybe need **correct the course of the generic operation** by cancelling existent tasks or by creating new tasks.

Cancelling Logistic operation tasks

From the kanban view the user just need to drag and drop the concerned task to "**Cancelled**" column.

From the form view, the users can cancel the tasks by clickin on "**Cancel Task**" button.

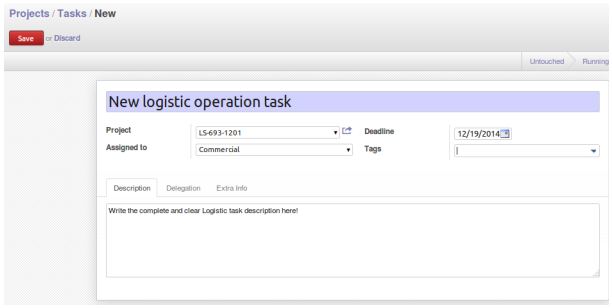


Creating new Logistic operation tasks

The user goes to **Project → Projects** and open the right one. then clicks on the "**Create**" button and then the follow screen appear.

The user fills the Logistic task name on the "**Task Sumary**" field. He also sets a "**Deadline**" to this task and assigns this task to another user if it is necessary.

Click on "**Save**" button to confirm the changes.



To get more details about the task managing please read the OpenERP User Manual for Internal Projects management.

Logistic Operations workflow

Tasks sequence

At the moment to write this user manual, this is the workflow defined for a logistic operation. Take in mind that this can change while the company improve the processes, then this list has a explicative finality.

Sequence	Task Summary	Assigned to
1	Cargo Quotation	Commercial
2	Collect cargo information	Logistic Secretary
3	Confirm Collected cargo information	Logistic Director
4	Planing cargo inspection	Logistic Director
5	Perform Cargo Inspection	Logistic Assistant
6	APPROVE: Cargo Inspection Report	Logistic Director
7	Quote Freight	Logistic Secretary
8	Book Space for shipment	Logistic Secretary
9	Send documents for Custom Clearance	Logistic Secretary
10	Send booking confirmation and loading Instructions	Logistic Secretary
11	Loading goods	Logistic Assistant
12	Make the Cargo PL	Logistic Assistant
13	Send Loading Report	Logistic Assistant
14	Generate invoices for goods bought by NCI	Logistic Assistant
15	CHECK: Loading Report	Logistic Secretary
16	Create Chinese Customs Clearance Invoices and PL in chinese	Logistic Assistant
17	Confirm BL Draft with customer	Logistic Secretary
18	Certificate Invoices	Logistic Secretary
19	Pay services to agent	Logistic Secretary
20	Create Freight invoices	Logistic Secretary
21	Get Original BL and Collect other documents to send	Logistic Secretary
22	CHECK: Original BL vs. Draft BL	Logistic Secretary
23	CHECK: Collected Original Documents before send	Logistic Director
24	Confirm customer payment	Logistic Secretary
25	Send Original Documents	Logistic Secretary
26	Documents Tracking	Logistic Secretary
27	Updating cargo status 1	Logistic Secretary
28	Updating cargo status 2	Logistic Secretary
29	Updating cargo status 3	Logistic Secretary
30	Updating cargo status 4	Logistic Secretary

The logic of this workflow is strictly sequential, it means that the tasks depend between them. To complete a higher level task, the lower level task need to be finished first. Anyway the teams can execute different tasks at the same time.

Note:

The complete description of the tasks can be found inside of each task at the Project module.

Distribution of Tasks and related modules

Most of the tasks have to be executed by using the Project module, anyway as we told before, in OpenERP all the modules are related, then some activities or documents related to the logistic operations will be executed by other modules or persons.

Here we will divide the tasks by responsible and will indicate which module of the ERP has to be used for each one.

Tasks Assigned to Commercial user:

Sequence	Task Summary	Module to execute task
1	Cargo Quotation	Sales Module

Tasks Assigned to Logistic Assistant user:

Sequence	Task Summary	Module to execute task
5	Perform Cargo Inspection	Project Module
11	Loading goods	Warehouse Module
12	Make the Cargo PL	Warehouse Module
13	Send Loading Report	Project Module
14	Generate invoices for goods bought by NCI	warehouse Module – Accounting Module
16	Create Chinese Customs Clearance Invoices and PL in chinese	Project Module

Tasks Assigned to Logistic Secretary user:

Sequence	Task Summary	Module to execute task
2	Collect cargo information	Project Module
7	Quote Freight	Project Module – Purchases Module
8	Book Space for shipment	Project Module
9	Send documents for Custom Clearance	Project Module
10	Send booking confirmation and loading Instructions	Project Module
15	CHECK: Loading Report	Project Module
17	Confirm BL Draft with customer	Project Module
18	Certificate Invoices	Project Module
19	Pay services to agent	Purchases Module – Accounting Module
20	Create Freight invoices	Sales Module – Accounting Module
21	Get Original BL and Collect other documents to send	Project Module
22	CHECK: Original BL vs. Draft BL	Project Module
24	Confirm customer payment	Project Module – Sales Module
25	Send Original Documents	Project Module
26	Documents Tracking	Project Module
27	Updating cargo status 1	Project Module
28	Updating cargo status 2	Project Module
29	Updating cargo status 3	Project Module

Tasks Assigned to Logistic Director user:

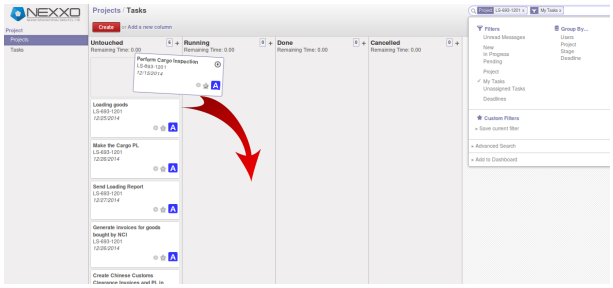
Sequence	Task Summary	Module to execute task
3	Confirm Collected cargo information	Project Module
4	Planing cargo inspection	Project Module
6	APPROVE: Cargo Inspection Report	Project Module

The tasks that are related only to the project module will be executed by using the main project module functions that we already describe before. We will start to show you how to execute the simple ones through a complete example.

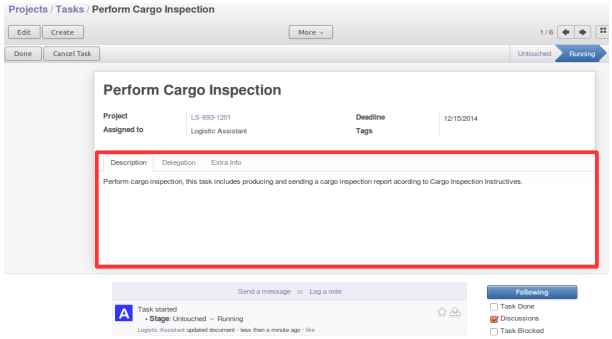
Example for Tasks to be executed by using only the Project module

Here we will show how the logistic assistant executes the "Perform Cargo Inspection" it is one of his tasks that only require use the project module. Based on the sequence, at this point the Logistic team planned the inspection then he already know which goods he has to inspect.

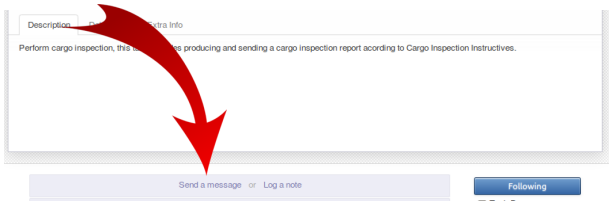
The scheduled day, the logistic assistant come to the warehouse and check his tasks. He goes to **Project → Project** and open the right one, he filters by "**My Tasks**" to find it easily. Then he moves the task to "**Running**" column.



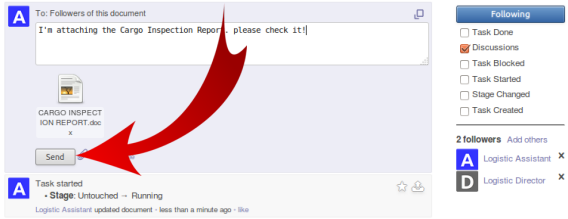
The logistic Assistant **opens** the task by clicking on it, then he can see the complete task description. "*Perform cargo inspection, this task includes* ***producing and sending a cargo inspection report*** *according to inspection Instructives*"



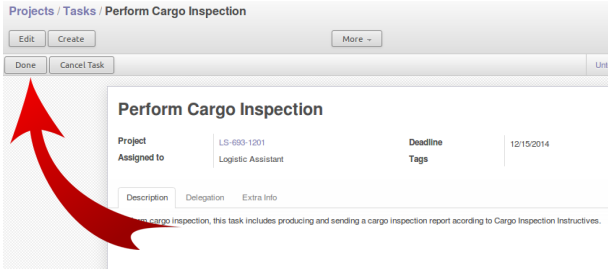
Once he had completed the goods inspection and created the report, he is ready to send it. He goes to the bottom of the task and clicks on "**Send a Message**" button.


Description
Perform cargo inspection, this
producing and sending a cargo inspection report acording to Cargo Inspection Instructives.
Send a message
Log a note
Following

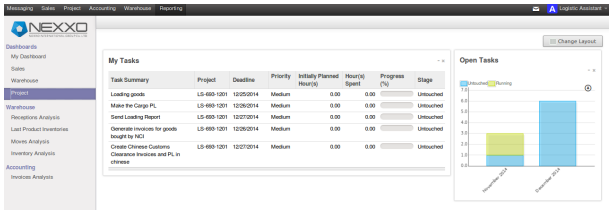
The logistic assistant attach the file to the task and clicks on "**Send**" button. The Logistic director will receive an email with that information and the file will keep in the right place all time. Maybe he has to wait for the answer to go ahead.



Now that he has accomplished the task, the last step is click on "**Done**" button at the left corner and the task will be finished.



Then the Logistic Assistant is ready to review the next task. He goes to **Reporting → Dashboards → Project** and the system will show him the list of tasks To do.



Exceptional Tasks: Using other OpenERP modules to accomplish tasks

On this chapter we will describe the tasks that are related with other modules of OpenERP and explain how to do those special tasks on the system.

Managing Logistic Sales Orders

Juan Esteban (or a colleague of him) will manage the logistics services sales as normally he do for the products sales.

Please check the **OpenERP user manual for sales teams** for details about how to:

- Create and qualify a new lead
- Convert the lead into an opportunity and create new customers
- Convert the opportunity into a sales quotation
- Confirm Sale Orders

Important:

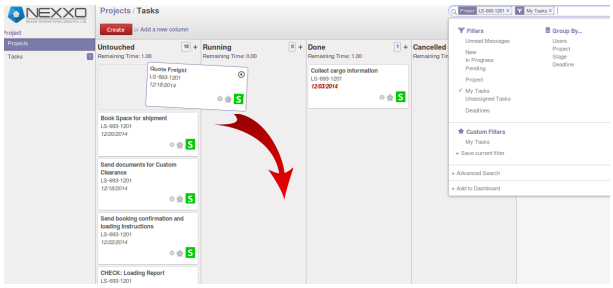
Juan Esteban will not confirm the Sales Order for the logistic services from the beginning because he don't know the final CBM or Weight until the goods are in our hands, also because the logistic service prices can change every time.

WAITING PRICE LIST FOR LOGISTIC SERVICES TO IMPROVE THIS SECTION OF THE DOCUMENT

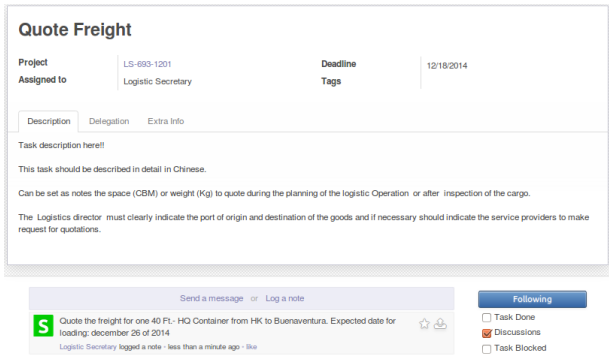
Buying Logistic Services to third: Apply to "Quote Freight" Task

Usually our company has to buy logistic services and other services to third persons or companies to complete the logistic operation. The "Quote freight" task will be useful to show how to register those purchases on the system through the purchase module.

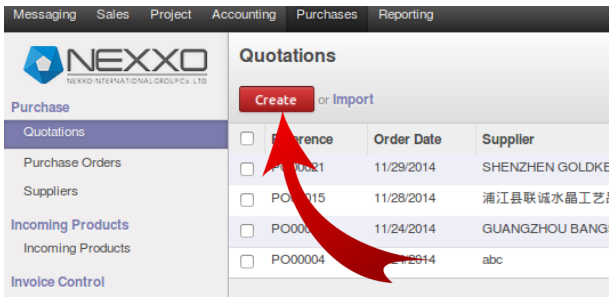
The scheduled day, the logistics secretary check his tasks, she goes to **Project → Project** and open the right one, she filters by "**My Tasks**" to find it easily. Then she moves the task to "**Running**" column.



The logistics secretary opens the task to check the details, there on the bottom she can see the notes and messages received from her boss about this topic. Then now she know which service and which supplier has to request for quote.


Quote Freight
Project
LS-693-1201
Deadline
12/18/2014
Assigned to
Logistic Secretary
Tags
Description
Delegation
Extra Info
Task description here!!
This task should be described in detail in Chinese.
Can be set as notes the space (CBM) or weight (Kg) to quote during the planning of the logistic Operation or after inspection of the cargo.
The Logistics director must clearly indicate the port of origin and destination of the goods and if necessary should indicate the service providers to make request for quotations.
Send a message or Log a note
Quote the freight for one 40 Ft.- HQ Container from HK to Buenaventura. Expected date for loading: december 26 of 2014
Following
Task Done
Discussions
Task Blocked

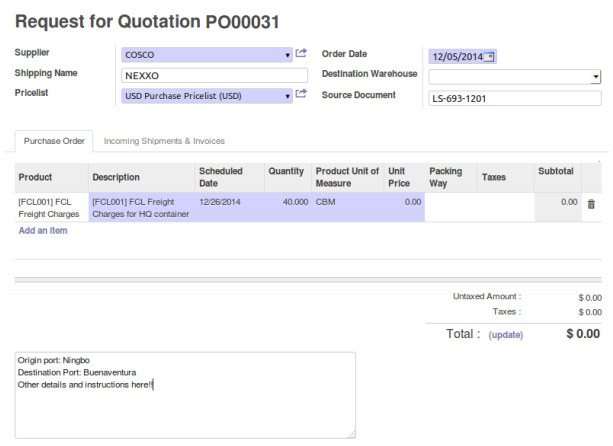
She goes to **Purchases → Purchase → Quotations** and she clicks on "**Create**" button.



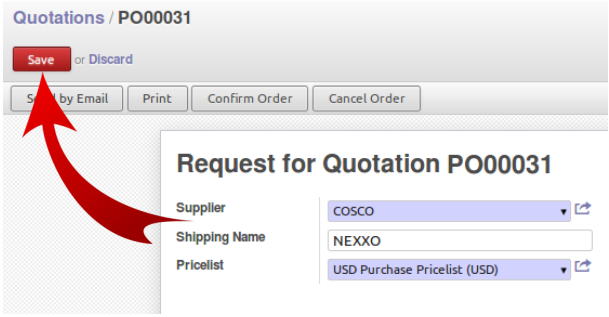
A new window appear, from the top she chooses the supplier to request quotation, ensures that the price list in USD and fill the "**Source Document**" field with the logistic project name.

On the middle she add the services to request for quotation by clicking on the "**Add an Item**" button and ensuring that is the right kind of service.

On the bottom she can add specific requirments into the "**Terms and conditions**" field.



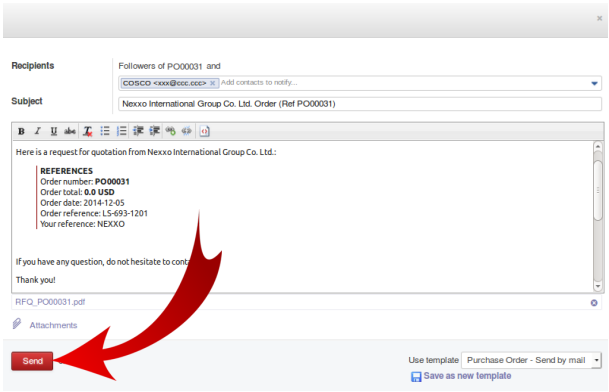
After she has filled all the information for the request, she clicks on "**Save**" button.



Now the logistics secretary clicks on the "**Send by email**" button then a pop-up screen will appear.

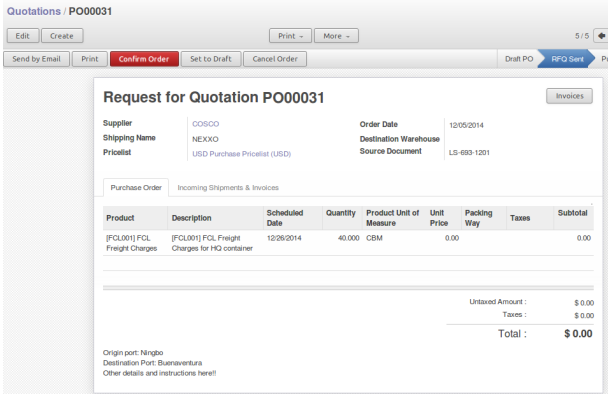
The system has a template email to request quotations to the suppliers what include a resume of the order request and the Purchase Order as attachment.

The logistics secretary clicks on "**Send**" button to send it to the supplier.



The status of this document changes to "**RFQ Sent**" but still on "**Quotations**" menu.

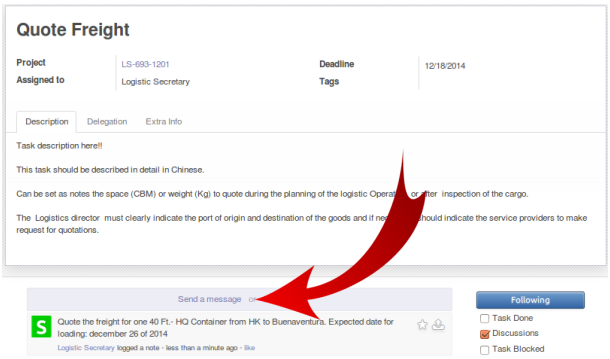
Now the logistics secretary just need to wait for the supplier reply.



Note: when the PO still as a Quotation, the user can apply any change on it, can edit the ordered products, Set to Draft when it already sent and even cancel the order directly. But when the user clicks on "Confirm Order" the PO can't be modify completely.

The logistics secretary can create more than one Request for Quotation for the Logistic Operation freight but at the end the Logistics director will choose only one and only one quotation can be confirmed, the rest of them have to be canceled.

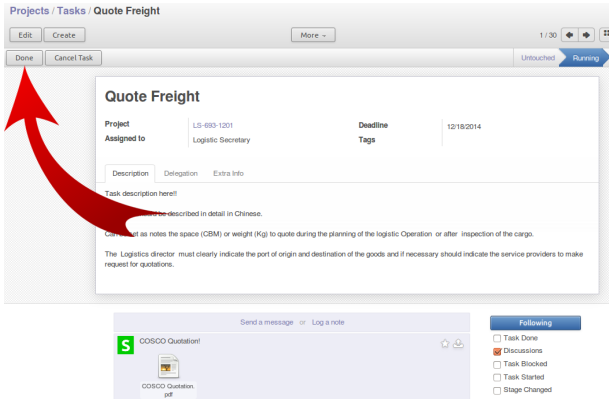
Once the suppliers sent a quotation for the request, she adds it to the project task directly like attachment to a note or like a message, like this, she can keep the record of each freight option and the logistics director will take the accurate decision.



She goes to **Project → Project,** opens the "**Quote Freight**" task and clicks on "**Send a message**" button.

The logistics secretary adds the quotation file by clicking on the "**Attach a File**" option and later she clicks on "**Send**" button.

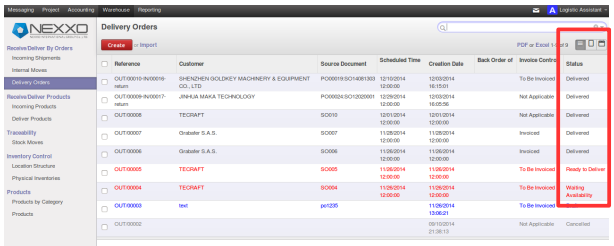
when she get the requested freight quotations then she can close the task by clicking on the "**Done**" button at the right corner.



Deliverying goods (bought by NCI only)

This procedure will be handle by the Logistic's assistant once the goods are going to be delivered from the menu: **Warehouse → Receive/Deliver By Orders → Delivery Orders**

This menu shows important data about the delivery order as Reference, customer, source documents, scheduled time, invoice control and the delivery order **status** which will be showed on the right side.

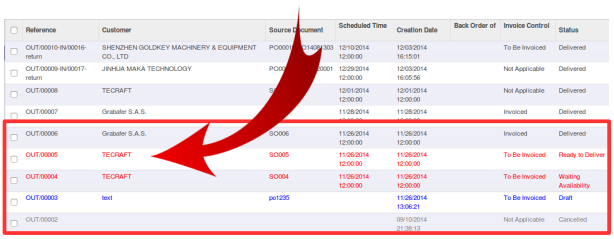


"**Ready to delivery**" status means that the order has Items ready to send out.

The delivery order lines will be showed in different colors depending of the status of it.

The Orders which the scheduled date has passed will be sowed red in color.

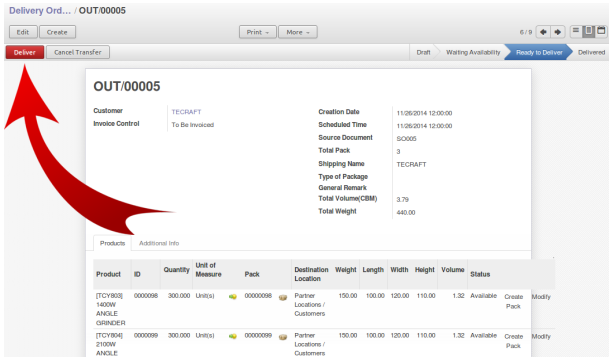
The logistic assistant clicks on the Delivery Order to process it, then a new window appear.



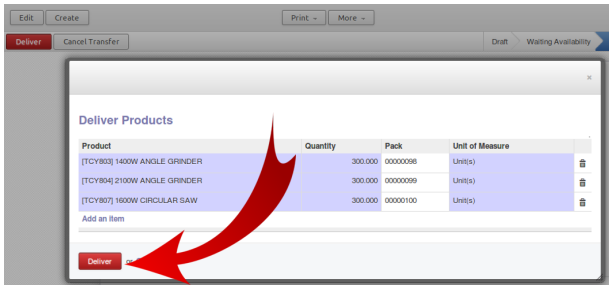
Here is the Delivery Order, on the top of this document the logistic assitant can see the general information about it: the customer, shipping name, total weight and CBM.

At the bottom, the logistic assistant can see the individual packing details including the content , sizes and weight for each one.

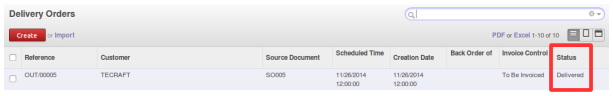
The logistic assistant clicks on “**Deliver**” button.



A pop-up appear asking to confirm the packages that will be send out. If all of them will be sent together, then just click on “**Deliver**” button.

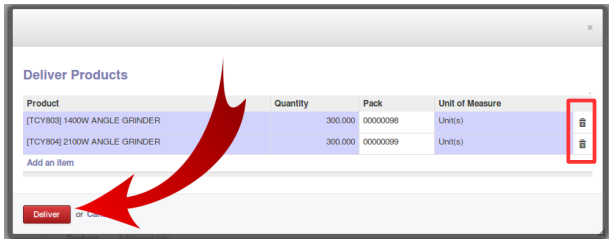


The status of the Delivery Order will change to “**Delivered**”

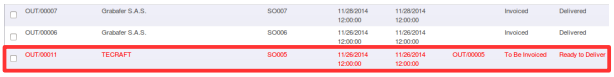


Exceptional situation: Partial Delivery

Other case, if for example one package will stay on the warehouse, then must click on the concerning "**Delete**" icon and later the logistic assistant clicks on "**Deliver**" button.



On this case, a new Delivery Order will be automatically created as a "**Back Order**" of the last one and the status will be also "**Ready to Deliver**"



reporte a juan esteban

mercancia bien almacenada

Confirming Logistic Services Purchase Invoice to Pay services to the agent

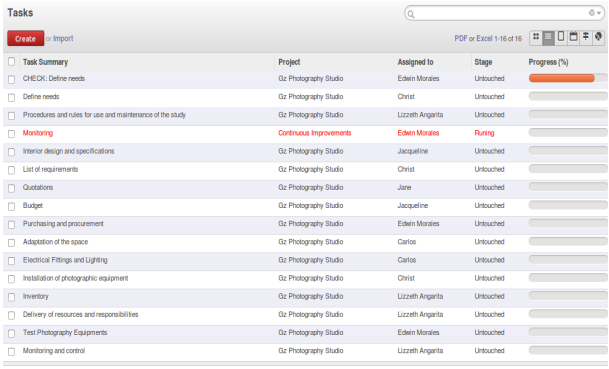
Creating Logistic Services invoices for the customers, (based on sales order for logistic)

Using different Views in OpenERP

At the end, just a quick word about the different View buttons in OpenERP. The screenshot below shows the kinds of buttons available. Each button represents a different way of looking at data.

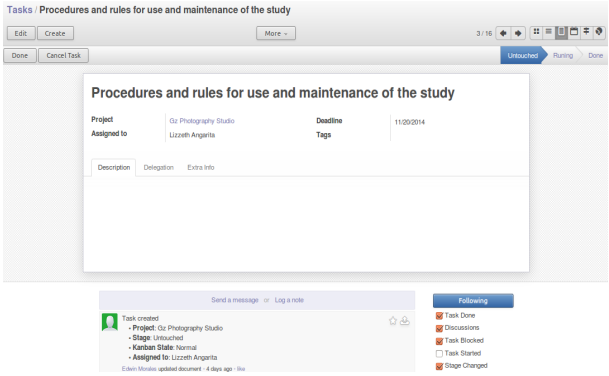
From the Tasks Screen, Scarlet clicks the List view button to get an overview of several Tasks at a time.

He clicks in **Project → Project → Tasks** and clicks the "**list view**" button



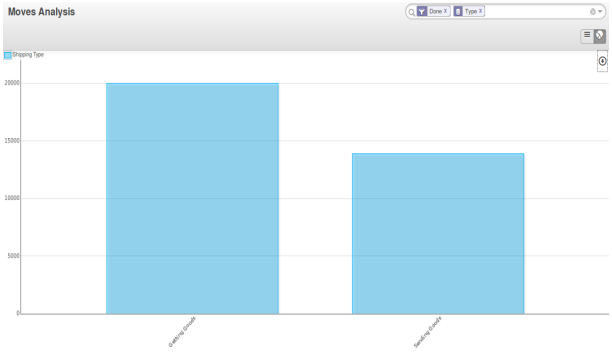
When She wants more information about a specific Task , she will switch to Form view.

He clicks in **Project → Project → Tasks** choose the concerned task and clicks the "**Form view**" button

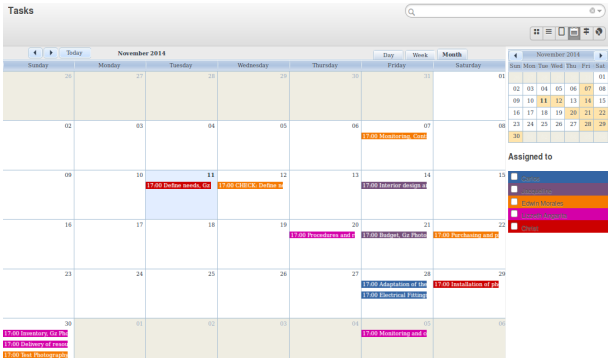


Then If Scarlet wants to see the project Tasks in a graphical representation, so he clicks the Graph view button to display a graph with the Tasks expressed in a bar chart representation (more graph options are availables).

She clicks in **Project → Project → Tasks** and clicks the "**Graph view**" button

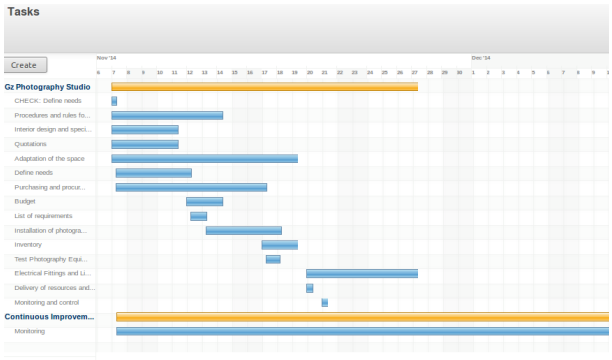


She could also choose to display the Tasks in Calendar view.



She clicks in **Project → Project → Tasks** and clicks the "**Calendar View**" button

Finally one of the most usable views is the Gantt View, Here Scarlett can see the tasks grouped by project with as a Scrum view, then she can calculate a project plan for earliest delivery using task ordering and the working time.



She clicks in **Project → Project → Tasks** and clicks the "**Gantt View**" button